



Using a Cardinal Checklist Overview

Cardinal Checklist functionality is used across the commonwealth to track and audit tasks when entering a New Hire, a Leave of Absence, and a Termination on an employee's Cardinal Job Record. The checklist enables audit departments to confirm when tasks are completed and recorded in Cardinal HCM.

When the user selects a Checklist, the Checklist items populate, allowing the user to "record" a change in status per item when the task has been initiated, completed, notified, and/or received.

COVHIR – Hire

When completing a new hire, use the New Hire Checklist to validate tasks are completed during the new employee onboarding.

COVLOA – Leave of Absence

When putting an employee on Leave of Absence, use the Leave of Absence Checklist to validate tasks are completed when entering a Leave of Absence on the employee's job record.

COVTER – Terminate

When completing a termination, use the Terminate Checklist to validate tasks are completed when entering a Termination on the employee's job record.

Table of Contents

Accessing a Checklist	2
-----------------------------	---

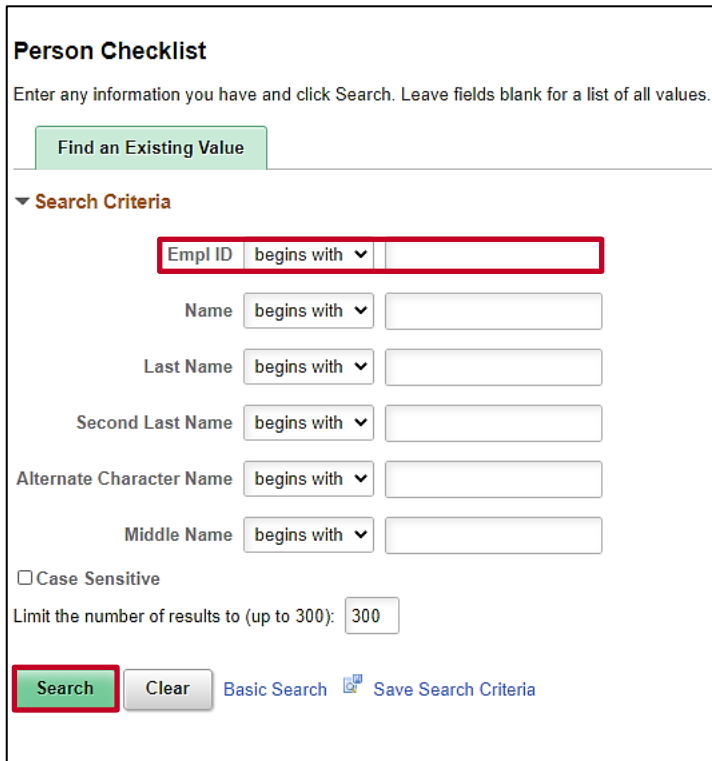
Accessing a Checklist

This overview uses the New Hire Checklist as an example. When completing a new hire, access and use the New Hire Checklist to validate tasks are completed prior to the new employee's start date.

1. Navigate to the Checklist page using the following path:

Navigator > Workforce Administration > Personal Information > Organizational Relationships > Person Checklist

The **Person Checklist Search** page displays.



The screenshot shows the 'Person Checklist' search interface. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a green button labeled 'Find an Existing Value'. A section titled 'Search Criteria' with a dropdown arrow contains several search fields: 'Empl ID' (with a 'begins with' dropdown and a text input field), 'Name' (with a 'begins with' dropdown and a text input field), 'Last Name' (with a 'begins with' dropdown and a text input field), 'Second Last Name' (with a 'begins with' dropdown and a text input field), 'Alternate Character Name' (with a 'begins with' dropdown and a text input field), and 'Middle Name' (with a 'begins with' dropdown and a text input field). Below these fields is a checkbox for 'Case Sensitive' and a text input for 'Limit the number of results to (up to 300):' with the value '300'. At the bottom, there is a green 'Search' button, a grey 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

2. Enter the Employee ID in the **Empl ID** field to search for the applicable employee.
3. Click the **Search** button.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. For further information on searching for employees, refer to the WBT titled **NAV205 Fluid Navigation Tips**. This WBT can be found on the Cardinal website under **Learning**. Cardinal security restrictions only allow users to view their agency employees.

Human Resources Job Aid

Using a Cardinal Checklist

The **Person Checklist** page displays.

Person Checklist

Person ID

Checklist History

1 of 1

View All

*Checklist Date

12/10/2020

+ -

*Checklist

Comment

Person Checklist Items

1-1 of 1

*Sequence	*Item Code	Description	*Status
			Initiated

Save

Return to Search

Previous in List

Next in List

Notify

4. The **Checklist Date** field defaults to the current system date. Update this date to the date the checklist was created using the **Calendar** icon.
5. Select the applicable Checklist using the **Checklist Look Up** icon.



Human Resources Job Aid

Using a Cardinal Checklist

The **Person Checklist** page refreshes and the applicable Checklist displays (below is an example of the **COVHIR - New Hire Checklist**) with the applicable tasks.

Person Checklist

Person ID

Checklist History

1 of 1

View All

*Checklist Date12/10/2020

*ChecklistCOVHIRHire

Comment

Person Checklist Items

1-28 of 28

*Sequence	*Item Code	Description	*Status	Link ID
100	VA_HIR	Hired into Cardinal	Initiated	
200	HIR200	CHRC Background (If Appl)	Initiated	
300	HIR210	Request Security Access	Initiated	
400	HIR220	ID Badge	Initiated	
500	HIR230	SSN Verified	Initiated	
600	HIR240	e-Verify Completed Succesfully	Initiated	
700	HIR250	HR Policies/Handbook Reviewed	Initiated	
800	HIR260	Leave Policies Reviewed	Initiated	
900	HIR270	Personal Data Received	Initiated	
1000	HIR280	Agency Email/Network Rcd	Initiated	
1100	HIR290	Email link to Self Service	Initiated	
1200	HIR300	Class, Comp, Posn Data Rcd	Initiated	
1300	HIR310	Written Agreement Rcd	Initiated	Written Agreement Rcd
1400	HIR320	Employee Match Search	Initiated	Employee Match Search
1500	HIR330	Match Search=0 Add a Person	Initiated	Match Search=0 Add a Person

Save

Return to Search

Previous in List

Next in List

Notify

6. The **Status** field defaults to “**Initiated**”. Click the corresponding **Status** drop-down button and select the applicable status (i.e., **Completed**, **Initiated**, **Received**, **Notified**) to update individual tasks.
7. Click the **Save** button.

Note: All checklist items should have a status of “Completed” for the Checklist to be considered complete and valid.